Factsheet

PI Planning Preparation Checklist

All attendees remote

For online collaboration tools you could use

A Single Canvas - with areas set out for each team plus shared areas

Multiple online boards - teams have their own and can access shared boards

We recommend two people running the event

The Host Facilitator – probably the RTE – who will be the visible host for the event

The Digital Facilitator - who runs the event behind the scenes

For video conferences you could use

A Single VC - with breakout rooms for the team breakouts

Multiple VCs - where participants will dial into team specific VC for the team breakouts

4 weeks to go

- Confirm who will be the Host Facilitator and the Digital Facilitator for the event
- Confirm who will be the Product Manager for the Agile Release Train (ART)
- Set dates and times for PI Planning and send out invitations
- Choose video conference and collaboration tools

2 weeks to go

- For each team in the ART, confirm who will be the Product Owner and Scrum Master
- Confirm who will deliver each of the briefings

1 week to go

- Check online collaboration tools have enough licences for the number of participants
- Setup online collaboration tools ready to be populated with content
- Confirm who, in each team, will present the draft/final plans, objectives and risks
- Confirm the Host Facilitator and Digital Facilitator have good equipment, connection and will be in a suitably quiet location
- Check the people doing the briefings and presenting plans have good equipment, connection and will be in a suitably quiet location

1 day to go

- Make sure the video conference details are tested and distributed
- Check the online collaboration tools have been populated with content
- Check the online collaboration tools are tested and access details distributed
- Contact details for Digital Facilitator distributed
- Contact details for key stakeholders collated
- Back up video conference and collaboration tools available and tested
- Set up an online poll for the confidence vote
- Set up an online survey for the end out event feedback

0 days to go

- Make briefings available to all participants
- Make sure Scrum Masters know how to access key stakeholders
- Confirm to participants how to get help or how to ask questions

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